

POSITION DESCRIPTION**IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3**

DOA-15302 (C07/2015)
PREVIOUSLY OSER-DMRS-10
State of Wisconsin
Department of Administration/Division of Personnel Management

1. Position No.

2. Cert / Reclass
Request No.
19-8155

3. Agency
No.
566

4. NAME OF EMPLOYEE

5. DEPARTMENT, UNIT, WORK ADDRESS
Wisconsin Department of Revenue
IS&E/Administration/Technical Services
2135 Rimrock Road
Madison, WI 53713

6. CLASSIFICATION TITLE OF POSITION

Revenue Auditor 6

7. CLASS TITLE OPTION (to be filled out by Human Resources Office)

8. NAME AND CLASS OF FORMER INCUMBENT

– Revenue Auditor 6

9. AGENCY WORKING TITLE OF POSITION

Technical Specialist – Advanced

10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES

Name – Revenue Auditor 6

11. NAME AND CLASS OF FIRST-LINE SUPERVISOR
Revenue Management Supervisor

12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE
PERFORMED THE WORK DESCRIBED BELOW?

13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes ___ No X
IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM.

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on Page 3.)

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

SEE ATTACHED

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Page 2)

- a. The supervision, direction, and review given to the work of this position is ☐ close ☐ limited ☒ general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.
(Please initial and date attachments.)

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee _____ Date _____

18. Signature of Human Resources Manager _____ Date _____

DISTRIBUTE COPIES OF SIGNED FORM TO:

☐ P-FILE ☐ SUPERVISOR ☐ EMPLOYEE ☐ CERT REQUEST COPY

REVENUE AUDITOR 6 – OTS TECHNICAL SPECIALIST– ADVANCED

Position # 308263

April 2019

POSITION SUMMARY (Line 14)

This is an advanced level position that acts as a lead worker of Technical Specialists responsible for technical expertise and assistance to taxpayers, practitioners, legislators, other government agencies, and department employees on federal and Wisconsin individual and fiduciary income, corporation and pass-through entity franchise/income, withholding, sales and use, excise, and/or other taxes and fees and/or unclaimed property. This position provides assistance and support to the Director of Technical Services in assigning, coordinating, and reviewing work of Technical Specialists. This position is also the advanced technical expert for one or more the following major tax types: individual and fiduciary income, corporation and pass-through entity franchise/income, withholding, sales and use, excise, and/or other taxes and fees and/or unclaimed property. Work is performed under general supervision.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 55% A. Performance of Lead Worker activities for unit staff.
- A1. Give advice, direction and guidance to Technical Specialists and other bureau experts and managers in researching tax laws, developing and revising legislative proposals and bill drafts, administrative rules, publications, forms and other written guidance.
 - A2. Review work product of technical specialists and recommend revisions for format, content and clarity of technical correspondence, issues papers, legislative proposals and bill drafts, administrative rules, publications, forms and other written guidance.
 - A4. Make assignments to Technical Specialists, including drafting issue papers, new forms, tax releases, legislative proposals, publications and similar written guidance, and manage deadlines.
 - A3. Provide individualized training and mentoring to new Technical Specialists on an as needed basis, including assisting them with researching and responding to complex technical issues, interactions with division managers and members of the Secretary's office and legislature.
 - A4. Monitor and evaluate professional development of unit/section auditors.
- 25% B. Prepare responses to the most complex technical tax inquiries, questions, and problems.
- B1. Perform research of state and federal law, DOR historical information, court cases, and department policies and procedures to determine answers to inquiries and problems.
 - B2. Prepare response in a manner which correctly interprets the law and is understandable to the person who asked the question. (Generally, only complex questions are referred to Technical Services, therefore, it is very important that the answers be accurate and are clearly understandable.)
 - B3. Consult with Division Administrator, Office of Technical Services Director, division's bureaus and the Legal staff as necessary.
 - B4. Make written and oral reports to management on very complex tax, audit, and accounting problems and recommend solutions or answers to the problems in issue papers and/or legislative proposals.

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- 20% C. Perform other tasks
- C1. Service as coordinator of one or more of the division level programs, such as confidentiality and disclosure, security, and informal rulings library.
 - C2. Act as a liaison between technical specialists and division managers and experts, Legal staff, research and policy staff, legislative liaisons, personnel in other state agencies, revenue departments, and the Internal Revenue Service.
 - C3. Develop, coordinate, and conduct training for new and experienced auditors and other department staff, tailoring training to the tax type and technical ability of various audiences as required.
 - C4. Participate in continuing professional education to remain current with respect to changes in federal and state tax laws.
 - C5. Lead special projects or other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES

1. Knowledge of Wisconsin and federal laws relating to individual and fiduciary income, corporation and pass-through entity franchise/income, withholding, sales and use, excise, and/or other taxes and fees and/or unclaimed property (depending on assignments).
2. Knowledge of Wisconsin and federal legal precedents, IRC regulations, federal revenue rules and procedures, federal publications, Wisconsin statutes, administrative code, audit manuals, and publications, and department policies.
3. Knowledge of federal and Wisconsin tax forms.
4. Knowledge of research techniques and resources.
5. Knowledge of related accounting and audit practices, procedures and techniques.
6. Knowledge of the department's integrated tax system (WINPAS)
7. Knowledge of bureau and section policies and procedures for audits and appeals
8. Knowledge of procedures used in other bureaus or work units which directly affect tax returns.
9. Knowledge of work rules.
10. Knowledge of effective committee/team participation techniques.
11. Knowledge of training and self-training techniques.
12. Knowledge of excellent customer service principles, including "Plain Language"
13. Effective written and verbal communication skills, including public speaking.
14. Organizational and prioritization skills.
15. Skill in using Microsoft Office Suite Products (e.g., Excel, Word, Outlook) or equivalent.
16. Customer service skills.

Special Requirement: This position requires that applicants have professional education, training, or work experience in accounting or auditing such as that which would be acquired by earning a Bachelor's Degree in accounting or auditing from an accredited post-secondary college/university; or equivalent in education, training and/or work experience.